



Container Terminal Planning & Operations

Marine Terminal Management Training Program

Philadelphia, PA

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Where are we headed as an industry?

- Larger vessels are really driving the bus!
- Four consortiums will now handle close to 90% of the available freight.
- AMPT Virginia put a “line in the sand”
 - Global Bayonne set another.
- Spikes and move counts.
 - 6,000 moves with four cranes = 43 hours sustained
 - 6,000 moves with six cranes = 29 hours sustained



While we as an industry have talked about it for several years....there is now a changed “arena”

- Constraints are plentiful
 - Water depth
 - Air draft
 - City-center locations
- Where are the traditional sources of capital?
 - USACE
 - Port Authorities
 - Terminal Operators
 - Ocean Carriers
 - P3's
 - The “investment” v. “the return”



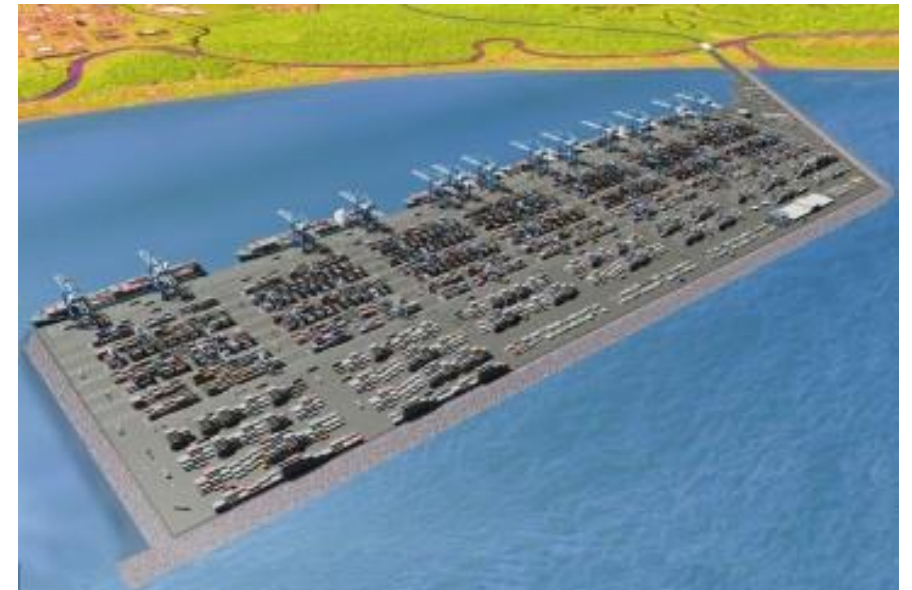
Do the “new generation” terminals want to go up against the “traditional” issues?....

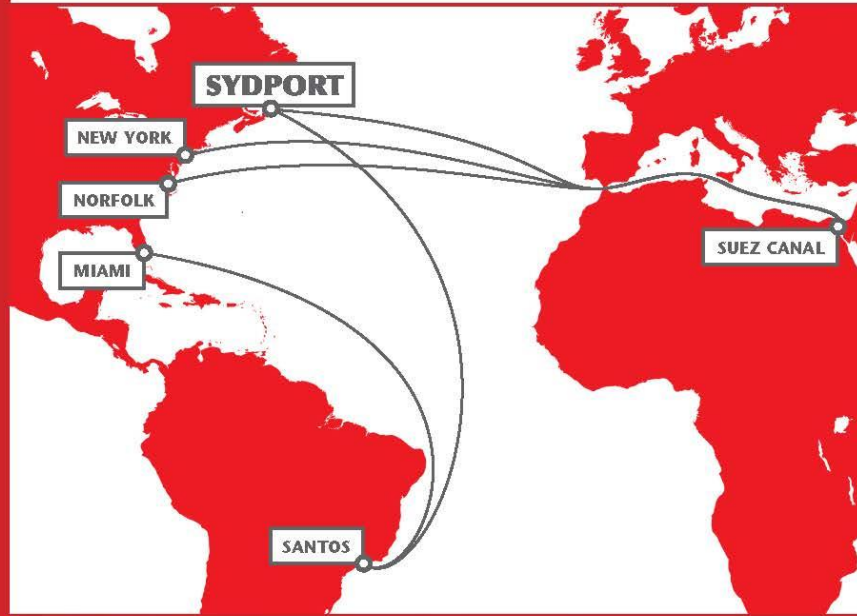
- Chassis
- RFID
- Higher Levels of Automation & Technology
 - Labor impacts
 - Training
- “Working the tides” and the “loadlines”
- BCO’s who require not only their reliable delivery; but it has to be “green”



We are starting to see a change....

- USACE interface
- Terminal Operators-“with a different skin in the game”
- Ocean Carriers-want the benefit
- Investor Community-really starting to look at the issue and perhaps package a “Wall Street” solution....
- The Greenfield is back!



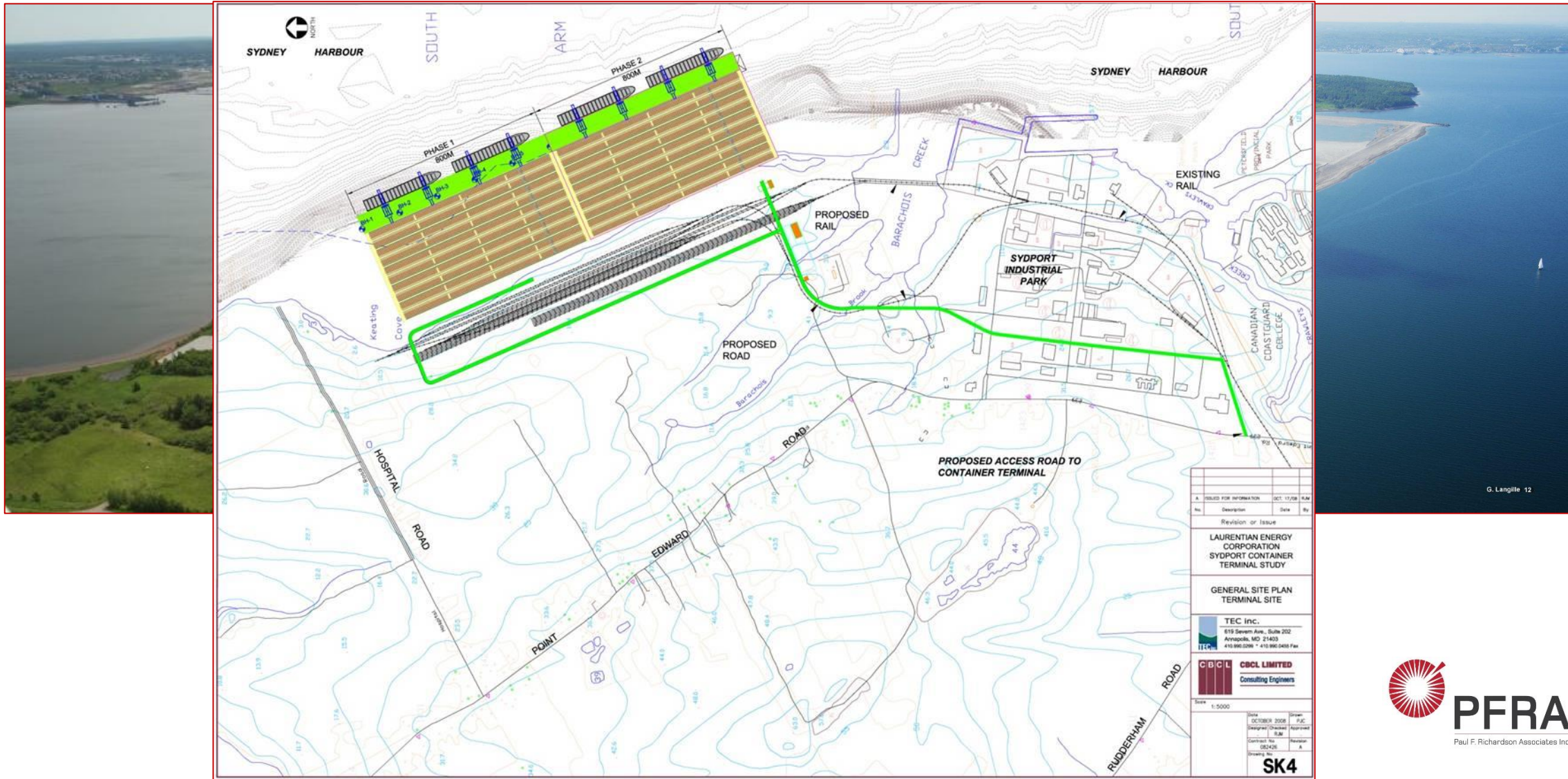


Looking East
Sydney Harbor
After Dredging
May 2012

It has been bantered about for a few years....

- Closest North American port to the Suez Canal
- No constraint
- No legacy operations
- Existing double-stack
- Divested by the federal government and now owned by a local government.
 - They don't want to be a port authority
- No truck traffic
 - Non-Jones Act gives trans-shipment breadth
 - Integration into the heartland with existing rail
- Real network capabilities
- Delivered cost?

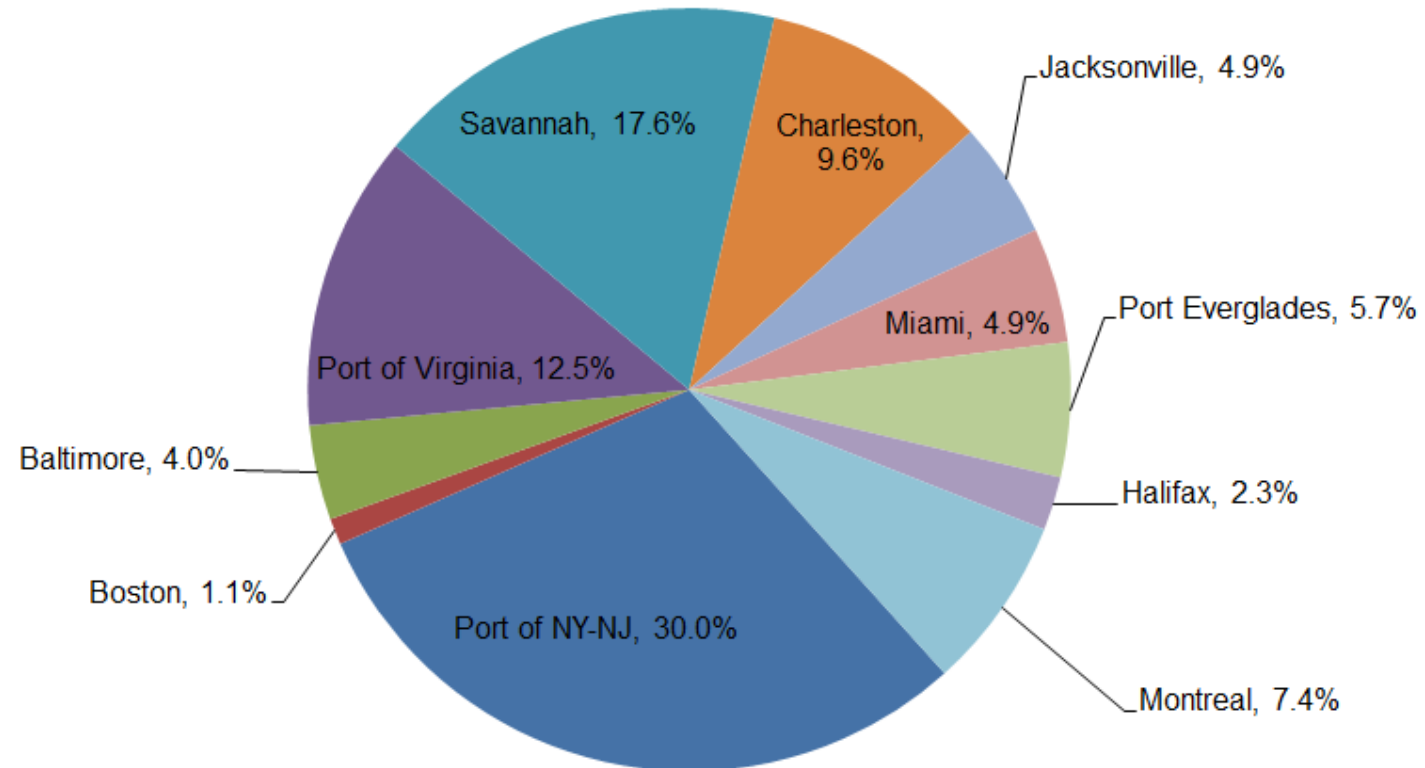
Quietly, they march forward....



Let us look at the Delaware Bay....

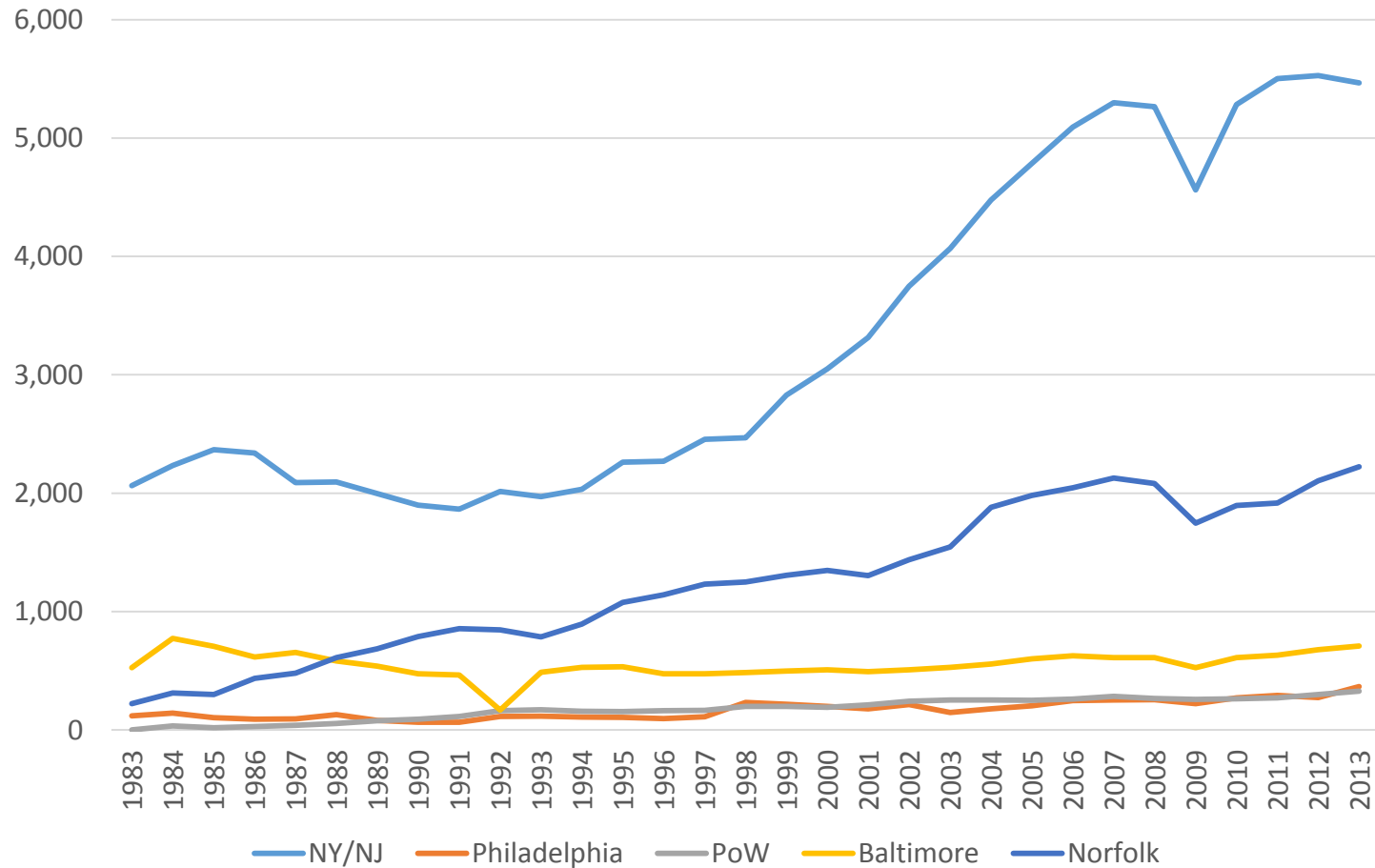
Share of East Coast Container Traffic: First Half 2014

Market Shares of Major North American East Coast Ports

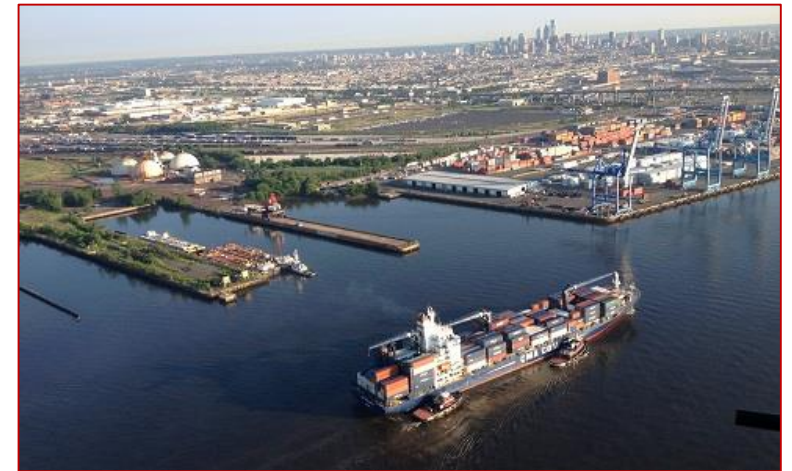
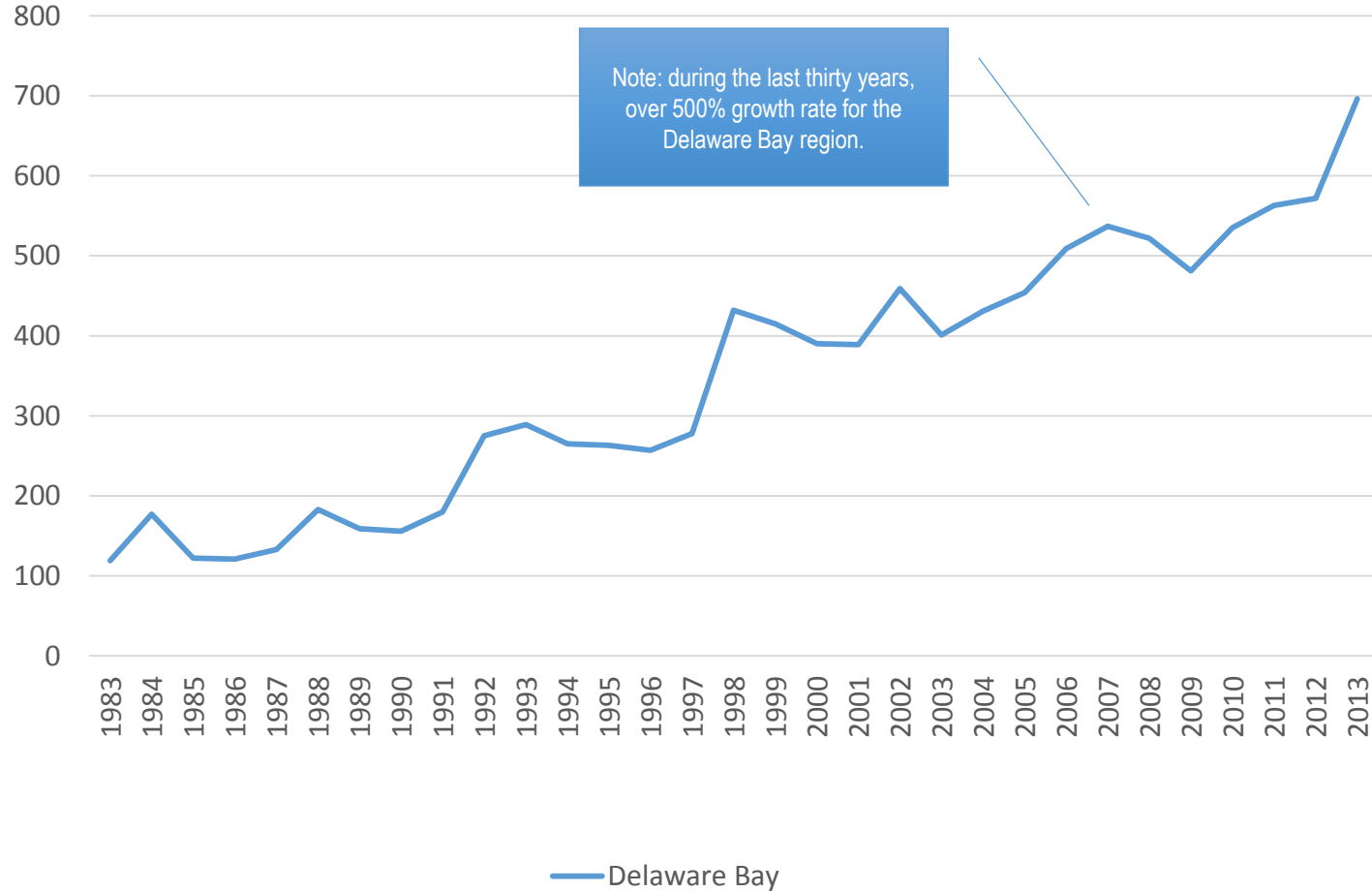


Source: Individual ports. Data includes imports, exports and empties.

No surprises here...or is there?



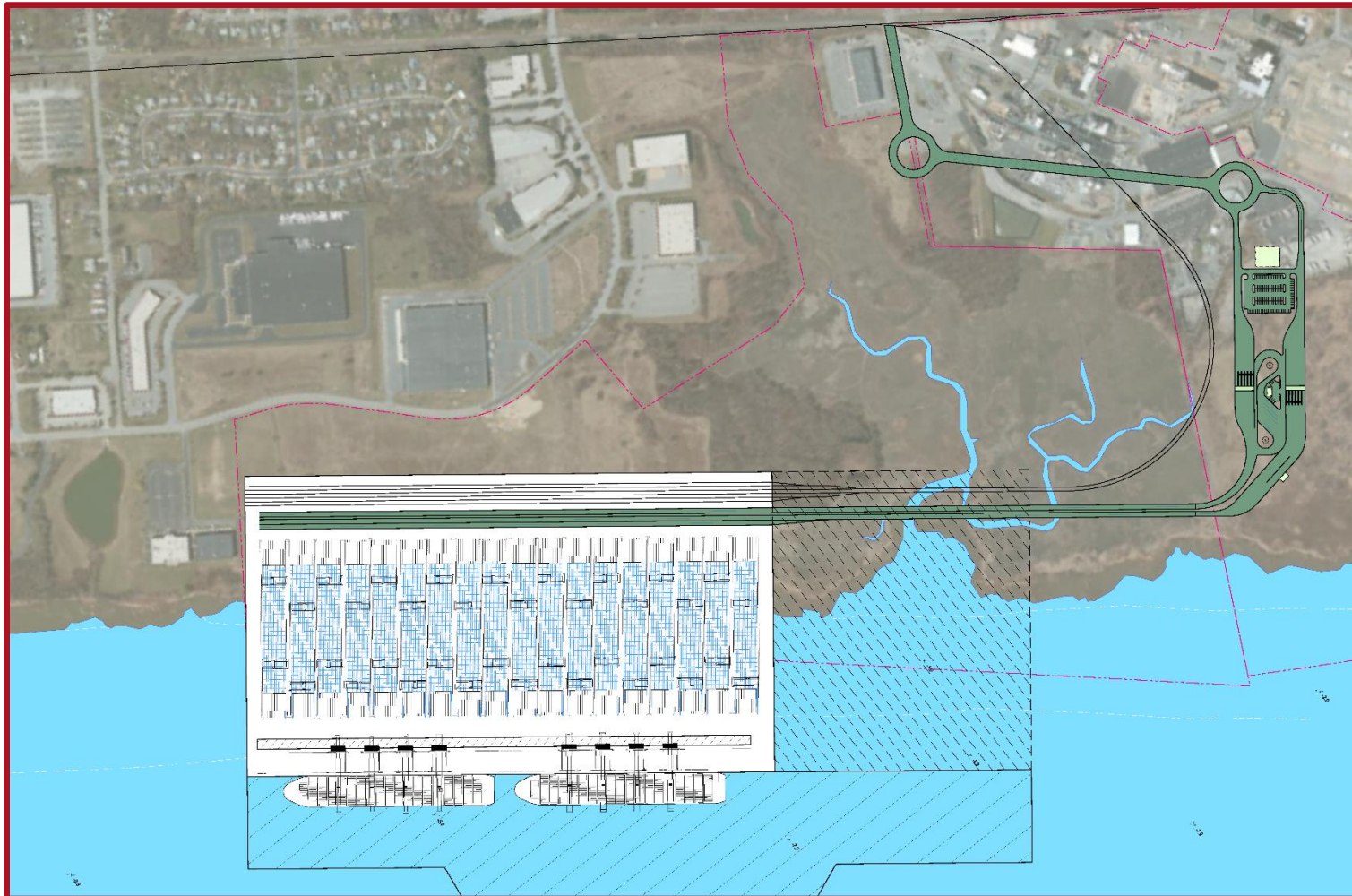
Well maybe....there is!



A City takes on a role....why?



A different role in container terminal development....



- Create regional economic impact...the elected official play
- Why not us too?
- A changing role with the traditional players
- Your dollars....and we facilitate!

So, which way is it going?....

